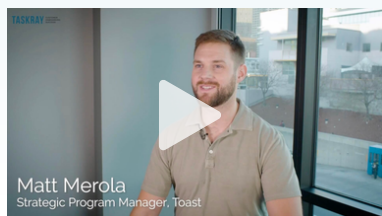


Managing complex implementations in Salesforce



About Toast

Toast provides a restaurant management platform that combines point of sale, hardware, software, and payment processing with a suite of third-party integrations to help restaurateurs improve operations, grow revenue, and delight guests.



How Toast Uses TaskRay

Toast uses TaskRay to streamline customer onboarding by assessing each customer (onsite or remote) and assigning the appropriate team, then generating a TaskRay template. TaskRay tasks guide the onboarding team through activities like kick-off calls, site surveys, menu build-outs, POS setup, and training.

Additionally, Toast integrates Salesforce Field Service Lightning to schedule onsite appointments and create corresponding tasks in TaskRay, keeping everything organized on one platform.



Toast's Pain Points Before Implementing TaskRay

Before TaskRay, Toast was managing and tracking customer onboarding projects using a single custom object in Salesforce, adding different fields along the way for customization. But with their company's rapid growth, they needed a more sophisticated tool that could plug into the other technology they rely on to execute onboardings — like Salesforce Field Service Lightning and Cirrus Insight.



Why TaskRay?

Each Toast customer has unique needs, requiring a flexible yet templated onboarding process. After evaluating several tools, Toast chose TaskRay for its ability to meet their requirements and budget. TaskRay allowed them to migrate from their old process while keeping all data on the Salesforce platform.



Results

While Toast's customer onboarding timeline is driven by the customer needs, they've measured initial success on how many customers a customer onboarding team member can manage at a given time.

According to Toast, "With TaskRay, workloads have been easier to manage and our customer onboarding team can manage more customers in a more structured way."



Why Toast loves TaskRay



ON SALESFORCE

Keeping their onboarding process on the Salesforce platform was crucial for Toast. Salesforce + TaskRay provides a single source of truth for all teams.



TEMPLATES

Each Toast customer is unique, but the customer onboarding process still includes a standard set of tasks that can be repeated and tweaked based on needs and timeline.



VIEWS

The Toast team can work in many of TaskRay's different views. From My Work to Plan View to Kanban, TaskRay provides a workspace for every type of onboarding specialist.



RESOURCE PLANNING

The workload that each team member can handle has significantly increased with TaskRay. And, forecasting ensures teams are set to scale with new business.



“ We wanted to be able to dynamically generate a different customer onboarding experience based on a specific segment and TaskRay could do that.



Matt Merola
Senior Program Manager, Toast